

## CHECKLIST: TERMINATION/RETIREMENT

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Name: \_\_\_\_\_ Empl ID: \_\_\_\_\_

Termination/Retirement Effective Date: \_\_\_\_\_

### ☐ UPDATE JOB DATA

*Role: Agency HR Specialist*

Navigation: **Main Menu > Workforce Administration > Job Information > Job Data**

Enter Termination/Retirement/Completion Action/Action Reason job row.

### ☐ ADJUST AND INACTIVATE TIME

*Role: Time and Labor Specialist*

#### ☐ *Identify Time Reporters with Time after Termination/Retirement Date*

Navigation: **Main Menu > Reporting Tools > Query > Query Manager**

Query: **WI\_TERM\_W\_TIME**

#### ☐ *Adjust Timesheet Entries*

Navigation: **Main Menu > Manager Self Service > Report Time > Timesheet**

#### ☐ *Update Time Reporter Data*

Navigation: **Main Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporters**

Set Rule Element 1 and Rule Element 4 to CASH and in activate Time Reporter Data.

#### ☐ *Calculate Comp Time Payout Balances*

Navigation: **Main Menu > Time and Labor > View Time > Compensatory Time**

Calculate Comp Time payout and send to Payroll.

### ☐ REVIEW AND ADJUST LEAVE BALANCES

*Role: Agency Absence Specialist*

Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances**

Identify leave balances and note whether to payout unused earned leave or if the leave is overdrawn.

### ☐ DELETE FUTURE DATED LEAVE ENTRIES

*Role: Agency Absence Specialist*

#### ☐ *Search for and delete future dated entries*

Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event**

#### ☐ *Verify no entries exist after termination*

Navigation: **Main Menu > Reporting Tools > Query > Query Manager**

Query: **WI\_TERMINATED\_WITH\_ABSENCE**

### ☐ PAYOUT/COLLECT LEAVE (IF APPLICABLE)

*Role: Agency Payroll Specialist*

Navigation: **Main Menu > State of Wisconsin (STAR) > Payroll > Process > Enter Payroll One Time Trans**

Process leave payouts or collections.

### ☐ SET FINAL PAYCHECK TO PRINT

*Role: Agency Payroll Specialist*

Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**

☐ **END GENERAL DEDUCTIONS**

*Role: Agency Payroll Specialist*

Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions**

☐ **END ADDITIONAL PAY**

*Role: Agency Payroll Specialist*

Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay**

☐ **VERIFY PAY FOR EXCEPTION TIME REPORTERS**

*Role: Agency Payroll Specialist*

Navigation: **Main Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck**

Verify pay calculated appropriately for time worked in last pay period.

☐ **INACTIVATE DIRECT DEPOSIT (AFTER LAST PAYROLL CONFIRMED BY CP)**

*Role: Agency Payroll Specialist*

Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**

☐ **REQUEST GARNISHMENT SUSPENSION**

*Role: Agency Payroll Specialist*

Notify Garnishment team.

☐ **FINALIZE TERMINATION-RELATED BENEFITS EVENT**

*Role: Agency Benefits Specialist*

Navigation: **Main Menu > Benefits > Manage Automated Enrollment > Events > Update Event Status**

**Reminders:**

- Any life insurance refund will be automatically generated if termination within the past 90 days
- Confirm that the employee is going to be on payroll long enough to collect the full month of premiums for the employee's last month of coverage – request POTTs as needed
- Reconcile benefit deductions and WRS contributions for the current year – request POTTs as needed
- Evaluate any arrears for the employee and if they need to be zeroed out or changed for the final payroll

☐ **VERIFY BENEFITS TERMINATION**

*Role: Agency Benefits Specialist*

*Health* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Health Benefits.**

*Life, AD&D* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Life and AD/D Benefits.**

*Disability* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Disability Benefits**

*Retirement* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Retirement Plans**

☐ **SEND COBRA/CONTINUATION NOTICES AS APPLICABLE**

*Role: Agency Benefits Specialist*